City of Alameda California

AGENDA

REGULAR MEETING OF
CITY OF ALAMEDA AMERICA'S CUP COMMITTEE
THURSDAY, FEBRUARY 2, 2012
6:00 p.m.

(Doors open by 5:45 p.m.)

BANQUET ROOM
SPEISEKAMMER RESTAURANT
2424 LINCOLN AVENUE, ALAMEDA

Anyone wishing to speak on any item on the agenda or business brought up by Committee Members or a member of the public may do so when the subject is brought up for discussion. (Please file a speaker's slip.)

If you wish to address the Committee, please file a speaker's slip with the Secretary.

- **Upon recognition by the Chair, approach the rostrum and state your name and address. Speakers are limited to five (5) minutes per item.**
- **Lengthy testimony should be submitted in writing and only a summary of pertinent points presented verbally.**

1. CALL TO ORDER AND ROLL CALL
2. MINUTES
   - 2.a. Minutes of the Meeting of January 5, 2012.
3. CONSENT CALENDAR
4. ORAL COMMUNICATIONS – PUBLIC

5. UNFINISHED BUSINESS

   5.a. Discussion of revised AlamedaWaterFront.com website.

   5.b. Discussion of future venues and schedule for Speakers Bureau.

6. NEW BUSINESS

   6.a. Discussion of AC34 Analysis of Potential Visitation Patterns.

7. SUB-COMMITTEE REPORTS

   7.a. Promotions

   7.b. Events

   7.c. Development

   7.d. Housing

   7.e. Dry Transportation

   7.f. Wet Transportation

   7.g. Syndicates

8. WRITTEN COMMUNICATIONS

9. ORAL COMMUNICATIONS – COMMITTEE MEMBERS AND STAFF

10. ADJOURNMENT

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*Sign language interpreters will be available upon request. Please contact Eric Fonstein, City of Alameda Economic Development Division, at 747-6895 or 522-7538 (TDD number) at least 72 hours before the meeting to request an interpreter. Accessible seating for persons with disabilities (including those using wheelchairs) is available. Minutes of the meeting are available in enlarged print. Audiotapes of the meeting are available upon request.

Please contact Eric Fonstein, at 747-6895 or 522-7538 (TDD number) at least 48 hours before the meeting to request agenda materials in an alternative format, or any other reasonable accommodation that may be necessary to participate in and enjoy the benefits of the meeting.

Documents related to this agenda are available for public inspection and copying at the Economic Development Division, Room 120, Alameda City Hall during normal business hours.

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE. Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City of Alameda exist to conduct the citizen of Alameda's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review.

FOR MORE INFORMATION ON YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE OR TO REPORT A VIOLATION OF THE ORDINANCE, CONTACT THE OPEN GOVERNMENT COMMISSION: the address is 2263 Santa Clara Avenue, Room 380, Alameda, CA, 94501; phone number is 510-747-4800; fax number is 510-865-4048, e-mail address is lweisige@ci.alameda.ca.us; and contact is Lara Weisiger, City Clerk.

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

DRAFT UNTIL APPROVED

MINUTES

SPECIAL MEETING OF
CITY OF ALAMEDA AMERICA'S CUP COMMITTEE
THURSDAY, JANUARY 5, 2011
6:00 PM

1. CALL TO ORDER

The meeting commenced at 6:04 p.m.

Present: Chair Chris Seiwald, Brad Shook, Dave Bloch, Jim Oddie, Jack Boeger, Kathie Woulfe, David Forbes, Kame Richards, Deborah Wright.

Absent: John Platt, Leslie Cameron, and David Lee.

Staff: Eric Fonstein

Public: Phil Albury.

1. CALL TO ORDER AND ROLL CALL

6:02 p.m.

2. MINUTES

2.a. Minutes of the Meeting of December 1, 2011.

- Approved.

3. CONSENT CALENDAR

4. ORAL COMMUNICATIONS – PUBLIC

- Phil Albury—introduced himself and his Alameda-based business, Nautic Share (nauticshareusa.com).

5. UNFINISHED BUSINESS

5.a. Discussion of presentations to December 6th City Council meeting and December 13th Alameda Association of Realtors Marketing Committee meeting.

- Chairman Seiwald—reported that the December 6th presentation received unanimous support from Council.
- Mr. Bloch—reported that the December 13th presentation went well in front of a very engaged audience.

6. NEW BUSINESS

6.a. Discussion of future venues and schedule for Speakers Bureau.

- Ms. Woulfe said that she can help schedule presentations to the local Rotary and Kiwanis Clubs.
- Mr. Fonstein will send an e-mail to the local business associations to offer a AC34 presentation to their boards and/or membership.
- Chairman Seiwald noted that giving the pitch will be the bulk of the committee's work: finding and encouraging groups and entities to get involved. He invited other members, in addition to Mr. Bloch, to make the presentations.
- Chairman Seiwald requested that each subcommittee develops a list of professional organizations, stakeholder groups, or key individuals relevant to that subcommittee's scope/recommendations. The Committee will review the lists at the next meeting and start scheduling the Speakers Bureau presentations.

6.b. Discussion of revised AlamedaWaterFront.com website and possible promotion at Alameda Theater.

- Mr. Boeger is considering a new domain name: Alamedaconnect.com
- Mr. Boeger said that the revised website will have information request forms in pull down categories, such as requesting dock space. The website will be broadly organized into sections, including but not limited to: "Visiting Alameda," "Living in Alameda," and, "Connecting with Businesses."
- Chairman Seiwald said that once the revised site is up, he would like to populate it as quickly as possible with live information, such as encouraging location businesses to register with the AC Event Authority and Alameda Connect's local business directory.
- Ms. Woulfe said that she would help to promote the website in the local papers on their community page.
- Chairman Seiwald suggested that the Speakers Bureau should ask to get the website linked to the groups in which we present. Mr. Boeger said that he could create "badges" to link to AlamedaWaterfront.com.
- Mr. Bloch said that he will approach the Alameda Theater about promotion opportunities once the revised website is up.
- Chairman Seiwald recommended that the website be associated with an icon.

7. SUB-COMMITTEE REPORTS

7.a. Promotions

- Mr. Bloch reported that the Promotions Subcommittee activities were covered under the discussion regarding the Speakers Bureau and scheduling of presentations.

7.b. Events

- Mr. Forbes informed the committee that Mr. Platt had twice contacted the AC Event Authority about the Fourth of July parade. He suggested that we try to get the actual cup for the parade.
- Mr. Shook suggested contacting "event planning" organizations to make a presentation. He has a contact with a San Francisco association and will forward the information to Ms. Wright.
- Mr. Forbes suggested that a calendar of events be placed on the website, e.g. the Jack London Boat Show.

7.c. Development

- Chairman Seiwald reported that he and Mr. Shook would like to take the Speakers' Bureau presentation to the major commercial property owners along the Northern Waterfront.
- Mr. Fonstein has been exchanging e-mails with the new superyacht representative for the AC Event Authority. Mr. Fonstein is scheduled to meet with him on January 9.

7.d. Housing

- No report.

7.e. Dry Transportation

- No report.

7.f. Wet Transportation

- No report

7.g. Syndicates

- Mr. Richards reported that the Artemis Team was offered Pier 80 at Hunter's Point. Mr. Richard would like to see space at Alameda Point be made available for free use by the syndicates. However, the city had not received a response from syndicates about their specific needs.
- Mr. Bloch will forward contact information for the other teams to Mr. Fonstein.

8. WRITTEN COMMUNICATIONS

9. ORAL COMMUNICATIONS – COMMITTEE MEMBERS AND STAFF

10. ADJOURNMENT

Adjourned at 7:09 p.m.

APPENDIX PD-1
Analysis of Potential Visitation Patterns for America's Cup 34

Analysis of Potential Visitation Patterns for America's Cup 34

INTRODUCTION

This report summarizes the methodology and analysis for estimating visitation patterns for America's Cup 34 (referred to as "AC34"), to be held in San Francisco from in August and September of 2012 and July through September in 2013. The purpose of this report is to develop estimates of the number of visitors on peak days in specific geographic areas to inform current planning efforts.

This report is divided into the following sections:

- Background and Methodology
- Key Assumptions and Considerations
- Estimate of Overall Visitor Attendance
- Visitation Patterns and Peaking
- Estimated Geographic Distribution of Peak Day Attendance
- Estimates for 2012 World Series

This analysis was conducted by Economics at AECOM (formerly Economics Research Associates) staff, in conjunction with the America's Cup Event Authority (ACEA), staff from the City and County of San Francisco, and the City's EIR consultant team.

BACKGROUND AND METHODOLOGY

There are two previous studies that included visitor projections for AC34. These studies were both conducted for the purpose of estimating economic and/or fiscal impacts. Given their purpose, both studies did not utilize a detailed approach to developing an attendance estimate, but rather, developed visitor projections that could be used as a reasonable basis for calculating economic impacts. Both studies were also more focused on evaluating net new visitors (i.e., net of visitors who would have come without the event), since this is the basis of economic impact. The visitor projection in both studies is reasonable given the purpose of their studies. However, a more focused methodology is required for the purpose of estimating AC34 spectators for planning purposes. Both studies also did not drill down beyond total attendance numbers to estimate visitation patterns.

The methodologies used by these studies are described below:

- Beacon Economics assumed that there would be a total of 2.75 million visitor days, of which, 2.3 million would be from local residents. The resident number is 115 percent greater than the local visitor days in Valencia and was developed assuming that the AC34 in 2013 would be roughly the equivalent of two Fleet Weeks. The Beacon report estimated that there would be a total of 450,000 non-local visitor days, equivalent to the number in Valencia. This was noted in the report as a conservative estimate that could be used as a baseline for economic impact purposes that would likely be higher given the larger population and income levels within reasonable proximity to San Francisco.

- The San Francisco Office of the Budget and Legislative Analyst reviewed the Beacon Economics report in a separate study. While this study found the estimates in the Beacon report reasonable, the Budget and Legislative Analyst also determined that a broader range of visitation was advisable for estimating economic impacts and used a range of 2.2 to 7.2 million visitor days by applying percentages to the Beacon Economics estimates.

Thus, while the Beacon Economics study addresses visitation, that was not its primary focus, and the projection was intentionally conservative as it was an input to economic factors of greater interest. The Budget and Legislative Analyst used a very wide range based upon the initial Beacon Economics estimate to demonstrate the breadth of possibilities.

At this point in the planning process, there is a need to develop an attendance projection and estimate visitor flow patterns that can be used for physical planning purposes.

Overview of Penetration Rate Methodology

The "gold standard" for estimating attendance potential at any attraction, event, or entertainment venue is "penetration rate analysis." Projecting attendance using penetration rates has been used for several decades to project attendance at both permanent attractions and more temporary events, including World Expos, Olympics, and festivals, and is a widely accepted industry standard.

Penetration rate methodology basically applies percentages, or penetration rates, to defined market segments (typically local residents and tourists) in order to determine attendance. The penetration rates themselves are based upon the following factors:

- The visitor experience and appeal of the planned program and/or concept for the event or attraction;
- Site and/or venue characteristics that might affect market potential;
- Market characteristics, including size, demographics, and other relevant characteristics;
- The experience of comparable events internationally, including their overall attendance, visitor origin, penetration rates into available resident and tourist markets, and other key metrics; and
- The experience of local events as relevant.

An important step in developing appropriate penetration rates is identifying the differentiating factors between comparable events and the event being analyzed and adjusting the penetration rates appropriately. This process is particularly important in the case of AC34, given the limited number of comparable events with available data and the unique characteristics of each one. Differentiating factors that affected our analysis are described in the "Key Assumptions and Considerations" section that follows later in this report.

Overview of Key Steps in Analysis

As discussed previously, the goal of this visitation analysis is to understand the number of spectators on peak days as well as to estimate their likely location. In order to get to this level of detail, we conducted the following broad steps:

- Using penetration rate analysis developed a range of total attendance for AC34 in 2013, including race days and non-race days.
- Estimated the attendance attributable to race days and non-race days based upon patterns in previous America's Cup events adjusted by relevant factors.
- Based upon the mid-range attendance scenario, estimated a range of peak day attendance. These estimates are in part based upon the experience in Valencia, the only other race for which detailed daily visitation is available, New Zealand, for which some limited data was available related to peaking,

Bay Area residents and tourist market patterns, and key characteristics of AC34 as planned in San Francisco.

- Using the mid-range peak day visitation number as a baseline, developed a series of visitor day profiles (i.e. average weekend day, average weekday, etc.) along with a likely percentage of visitation and number of days in each category.
- Estimated the broad geographic distribution of a peak average day based upon demographic characteristics and origin of likely spectators.
- Developed more specific geographic distribution estimates for specific areas inside and outside of San Francisco, based upon spectator origin, access, capacity of each location and assumptions about appeal of viewing areas, programming, and marketing.

KEY ASSUMPTIONS AND CONSIDERATIONS

Several assumptions and observations are relevant to the quantitative analysis behind the projections of attendance for AC34:

- By design, every America's cup is unique. Each one has a different number of racing days, different structure of competitive events leading up to the America's Cup finals, and different location.
- Attendance statistics from previous America's Cups are generally for the "Village" accommodating the central hub of race associated activities. In previous America's Cups, little or none of the race itself was visible from the Village, or from the shore in general.
- In San Francisco Bay, AC34 will be visible from multiple public viewing areas all around the Bay within a close range. There will be primary viewing areas that will be directly adjacent to the race course and allow for maximum viewing, and secondary viewing areas with more limited views.
- Because of the easy public assess of the whole series of racing events leading up to and including AC34, millions of individual people will be exposed to the events in-person, and many millions of "attendance-days" will be generated over several months of race related activities.
- The level of interest individuals have in the races will range from the intense interest of participating members of the syndicates and sailing enthusiasts from various countries to casual recreationists along the waterfront who time their outings to see part of the racing activities first hand or are attracted by the venue entertainment.
- From the perspective of race promoters and sponsors, the important statistics are those estimating the total number of people and their multiple exposures to the events that can occur over the entire time period.
- From a planning perspective, the important statistics are those which estimate how many people are present at one time, and especially how large a crowd AC34 attracts on the peak days.
- The exact number of syndicates, race days, and race format is still in development, and attendance is based on assumptions in this memo and present when this analysis was conducted.
- San Francisco routinely accommodates large crowds for events, for example:
  - Ballgames and concerts at AT&T Park (40,000 to 50,000),
  - Major parades and street fairs, such as Carnaval, the Chinese New Year Parade, and the Folsom Street Fair (300,000 to 500,000),
  - Fleet Week and the airshow (over 500,000).
- Given the very long length of time that racing and associated activities will be taking place, the peak day attendances will be a small fraction of the total event attendance.

- Obviously, the final heats of racing will attract significant interest. The final day of the Louis Vuitton series and the final day of the America's Cup itself are assumed to be among the peak days.
- The first days of racing in the LV and AC series are also likely to be among the peak days, because they will be the first days of actual racing after a period of hiatus.
- The attendance estimates presented below are based on expectations of interest within the available markets for the sailboat racing as well as entertainment and other festival activities currently planned.
- The attendance assumptions include a Youth Cup that will be held between the LV Cup and the AC Match races.
- The general public viewing attendance will be affected by weather. At the lower end of the interest continuum, some viewers are likely to be "fair weather attendees."
- The visitation projections are primarily intended to represent spectators who have intent to attend the races and/or festivities.
- Note that the growth of social media between now and 2013 may impact AC34 attendance, either positively or negatively, as aspects of the events leading up to it "go viral."
- Further market adoption of interactive, mobile media (e.g., smart phones) has the potential to even out crowds in viewing areas in real time by directing people away from areas that are already approaching capacities.

ESTIMATE OF OVERALL ATTENDANCE POTENTIAL

AECOM carefully reviewed the experience of three fairly recent America's Cup events in Valencia and New Zealand and developed penetration rates based upon our quantitative analysis and understanding of the key differentiating qualitative factors between previous America's Cups and AC34. We also examined attendance at events in San Francisco. Specific assumptions associated with our analysis are as follows:

- These estimates are for AC34 2013 only. At the end of this report, we provide projections for the AC34 2012 events.
- While the specific number of race days is not yet known, with input from ACEA, we have assumed 45 race days and 40 non-racing days, to be held between July and September 2013. It should be noted that the ultimate number of racing days is not likely to be known until the end of AC34 and does not substantially affect the attendance projection, nor does it affect peak days.
- The number of syndicates is not yet known, but is estimated to be between 10 and 15. The specific number does not materially affect our attendance projection.
- China has just announced its entry into AC34, which we expect will attract interest from the Bay Area's large Chinese American and Asian Pacific Islander population, as well as tourists from the Pacific Rim.
- There is likely to be induced visitation (i.e. additional tourism drawn to San Francisco specifically for this event) based upon the experience of other America's Cup events.
- A detailed program is not yet known for performances, activities, etc. in the village and in other spectator areas. However, based upon conversations with ACEA, it is anticipated that a robust array of programming including entertainment, concerts, food vendors, children's and family activities, and other activities will be planned to accompany the racing. The entertainment is expected to occur during and between races. The America's Cup organizers are placing a special emphasis on creating a well-rounded event alongside the racing with the intent of generating interest in the event.
- The racing will be close to and visible from the shore.

- Projections were made assuming there are no major economic, natural, or other disasters or calamities that would substantially affect the ability of markets to attend the events, and the economy continues to recover.

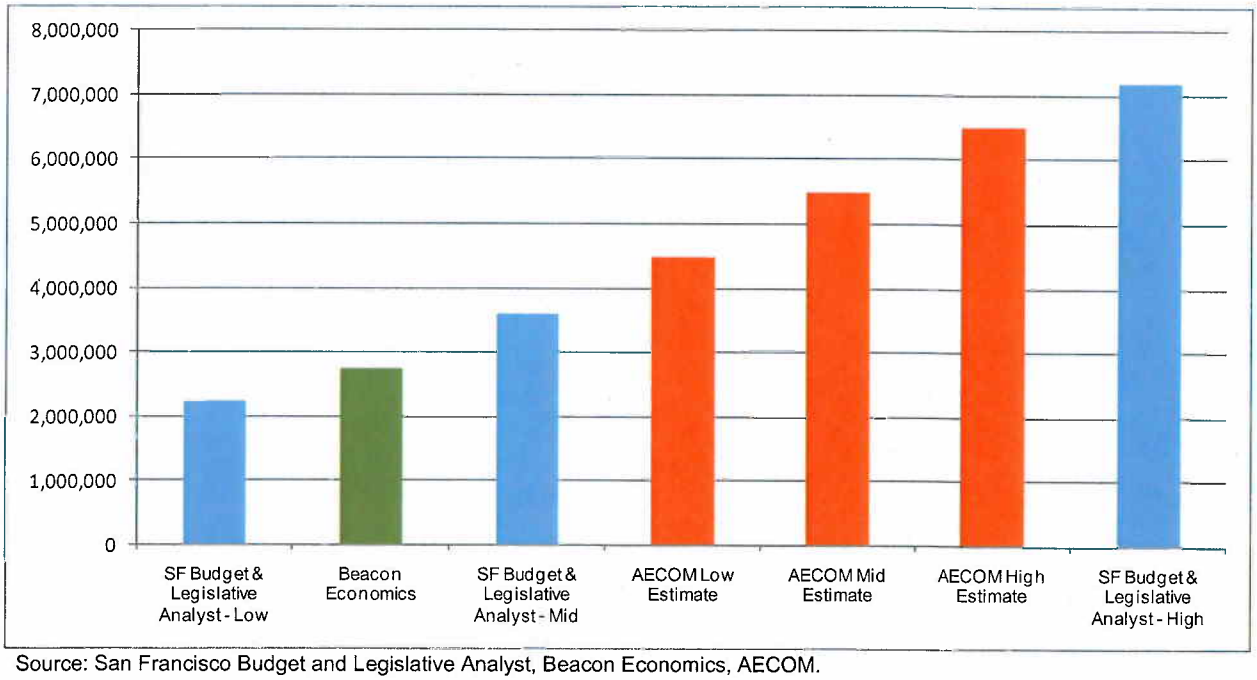
Our resulting attendance projection for AC34 is shown in **Figure 1** below. As indicated, our estimate ranges from 4.5 to 6.5 million, with a mid-range attendance projection of close to 5.5 million. The penetration rates shown were developed by first establishing a baseline from previous America's Cups, and then adjusting for factors discussed in the assumptions below. As shown in **Figure 2** below, our estimates fall with the range of the estimates used by the San Francisco Budget and Legislative Analyst report.

Figure 1: Estimate of Visitation for AC34 2013

Market Segment	Market Size 2013	Penetration Rate Low	Mid	High	Projected Visitation Low	Mid	High
Resident Market	7,400,000	35%	40%	45%	2,590,000	2,960,000	3,330,000
Tourist Market	12,650,000	15%	20%	25%	1,897,500	2,530,000	3,162,500
Total	**20,050,000**	**22%**	**27%**	**32%**	**4,487,500**	**5,490,000**	**6,492,500**
% Residents						**54%**	
% Tourists						**46%**	

Source: California Department of Finance, San Francisco Travel Association, AECOM.

Figure 2: Comparison to Visitor Estimates in Previous AC34 Studies



Source: San Francisco Budget and Legislative Analyst, Beacon Economics, AECOM.

In **Figure 3** on the next page, key attendance and operating characteristics for the estimated AC34 attendance projection and race are compared to three recent America's Cup events.

Figure 3: Comparison of Attendance Projection and Key Characteristics of AC34 (2013) to Previous America's Cups

Key Factors	New Zealand 2000 AC 30	New Zealand 2003 AC 31	Valencia 2007 AC 32	San Francisco 2013 AC 34
Event Length				
Total No. of Event Days	126	182	94	85
No. of Race Days	55	45	52	45
No. of Non-Race Days	71	137	42	40
% Race Days	44%	25%	55%	53%
% Non Race Days	56%	75%	45%	47%
Visitation				
Total No. of Visitors	4,350,000	3,477,300	2,871,750	5,490,000
% Resident Visitors	59%	51%	53%	54%
% Tourist Visitors	41%	49%	47%	46%
Penetration Rate Analysis				
No. of Resident AC Visitors	2,558,050	1,784,240	1,517,010	2,960,000
No. of Tourist AC Visitors	1,791,920	1,693,060	1,354,740	2,530,000
Size of Resident Market	1,115,000	1,190,000	2,581,000	7,500,000
Size of Tourist Market	7,200,000	7,384,000	2,800,000	12,650,000
# of Hotel Rooms	9,400	10,600	n/a	33,000
Resident Market Penetration Rate	229%	150%	59%	39%
Tourist Market Penetration Rate	25%	23%	48%	20%

Source: AECOM.

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As shown in the above chart, the overall attendance projection is higher for AC34 than previous races, although penetration rates are lower. Below are the factors that we considered in our analysis that contributed to increased attendance:

- In the previous studies, only attendance to the village was included, which likely understated the total visitation.
- China has entered a team into the race.
- There is more local sailing interest in the Bay Area than in Valencia (although not compared to Europe).
- The Bay Area resident market has more favorable income and demographics than the Valencia region.
- There is a more compact schedule, which based upon our discussion with organizers and our review of the data is likely to lead to higher attendance. In AC31, the events were held over a fairly lengthy period, which negatively affected attendance due to increased "race fatigue" and teams leaving early.
- The Bay Area has much larger resident and tourist markets than any of the previous venues.
- The racing can be viewed from the shore of the Bay, compared to both Valencia and New Zealand where much of the viewing was on a large screen in the village as the race was off-shore.
- AC34 will debut brand new 72 foot yachts, which are likely to be played up in the media and attract people.
- There is a specific intent on the part of organizers to provide a robust offering of entertainment and other programming that will attract visitation and transform this event from a race-focused one to a festival with racing. Thus, it may have broader appeal than previous events.

It should be noted that penetration rates are actually lower, primarily due to the large sizes of Bay Area resident and tourist markets. Smaller markets with less competition for people's leisure time typically have higher penetration rates for major events and attractions than do large metropolitan areas such as the Bay Area.

VISITATION PATTERNS AND PEAKING

After developing the overall attendance, AECOM analyzed the likely visitation peaking pattern for the event. We analyzed the available data for Valencia and New Zealand and held numerous discussions with race organizers regarding the qualitative characteristics associated with AC34 2013, as compared to previous events.

The Valencia event experienced peak day visitation of roughly 4.5 percent of total race day attendance, and the New Zealand events were slightly higher. It is our opinion that there is potential for higher peaking for AC34 in San Francisco, given the following factors:

- The racing can for the first time be viewed close to the shore, from several geographic locations in San Francisco. There will be a much greater difference in visitor experience in AC34 than in previous races on race days versus non-race days.
- All weekends are more likely to have racing based upon the schedule and due to the new type of boats. In Valencia and New Zealand, this was not the case, as they were spread over longer periods of time and had races rescheduled to wind conditions. The new 72 foot yachts will provide a wider weather window for racing, likely resulting in fewer weekend race days rescheduled to weekdays.
- The village in San Francisco at Piers 27 and 29 will be in a separate location from team bases, so activity levels may not be as intense as in the village in Valencia and New Zealand on non-racing days, again creating a greater differential between the visitor experiences on race and non-race days.
- The AC Match is designed to have the Oracle team racing, which is not only an American team racing in the United States but also will include Larry Ellison, somewhat of a local celebrity, racing in his own region.

In order to establish visitation patterns, we created several profiles of hypothetical event days with varying levels of interest. We first examined the peak day experience of previous America's Cups, developed an average peak day estimate for AC34 2013, and then developed subsequent assumptions for categories of event days. The estimates are shown in **Figure 4** on the following page.

Figure 4: Estimate of Peak and Average Attendance Days – AC34 2013

Race Day Profile	# of Days	% of Visitation Per Day	% of Visitation Total All Days	Number of Visitors Per Day	Number of Visitors Total All Days
Average Peak Race Day	5	7.0%	35%	334,340	1,671,700
Super Peak Race Day	*1*	*8-10%*	*8-10%*	*400,000-500,000*	*400,000-500,000*
Avg. Peak Race Day not including the Super Peak	*4*	*6.4%*	*26%*	*305,425*	*1,221,700*
Medium High Weekend / Holiday Race Days	6	4.0%	24%	191,050	1,146,300
Average Weekend / Holiday Race Days	12	2.0%	24%	95,530	1,146,000
Average Race Weekdays	22	0.77%	17%	36,910	812,000
Peak Race Weekday	*11*	*1.0%*	*12%*	*50,000*	*550,000*
Non-Peak Race Weekday	*11*	*0.5%*	*5%*	*23,800*	*262,000*
Total Race Days	**45**	**n/a**	**100.0%**	**24,000-450,000**	**4,776,000**
Non Race Day	**40**	**0.33%**	**13.0%**	**18,000**	**714,000**
Total All Days	**85**				**5,490,000**

Source: AECOM.

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A general description of the race day profiles created is as follows:

- An average peak day may consist of the opening race days or race finals for the Louis Vuitton Cup or AC match, competitions featuring high interest countries on weekends, or a day near the beginning or end of the competition with exceptionally good weather. We expect that these days will all occur during weekends.
- A "super peak" day would only likely occur once and would likely result from the intersection of a number of factors, such as a key final with good weather and interesting teams racing, and perhaps a popular entertainment group performing in one of the programmed areas. We have included estimates for an average peak race day with and without the "super peak" day.
- A medium high weekend / holiday race day is likely to be a race day with high interest either due to the teams competing or "shoulder" times close to the opening day or finals. It could also be a race day on a weekend with exceptionally good weather or near a holiday weekend.
- An average weekend / holiday race day would be a typical weekend day with racing, most likely in the middle of the series, during the youth cup, etc.
- An average race weekday is a typical race day during the week. We expect that there may be some peaking during the week as well depending on the teams who are racing, so have included an average peak race weekday as well as a non-peak race weekday.
- Finally, there will be a series of non-race days that will still attract some visitors.

As shown, we estimate that an average peak day (of which there are likely four or five) will attract approximately 334,000 spectators throughout the course of the day. It is possible that one day within this average (i.e. the "super peak day") could receive higher visitation if the combination of good weather, race schedule and position, and competing teams that generate interest all fall upon one day. An average peak day without the "super peak" day is estimated to attract around 305,000 spectators. For planning purposes, we have used the attendance estimate for an average peak race weekend day, which is 334,000. We have also conducted more detailed analysis for an average race week day, with an estimated attendance of 50,000 spectators.

In order to provide some context for these numbers, we have included the following table which summarizes estimates of attendance data for key festivals and events in San Francisco (see **Figure 5**).

We have also included the visitation pattern from AC32 in Valencia to demonstrate the peaking that typically occurs as part of America's Cup events (see **Figure 6**).

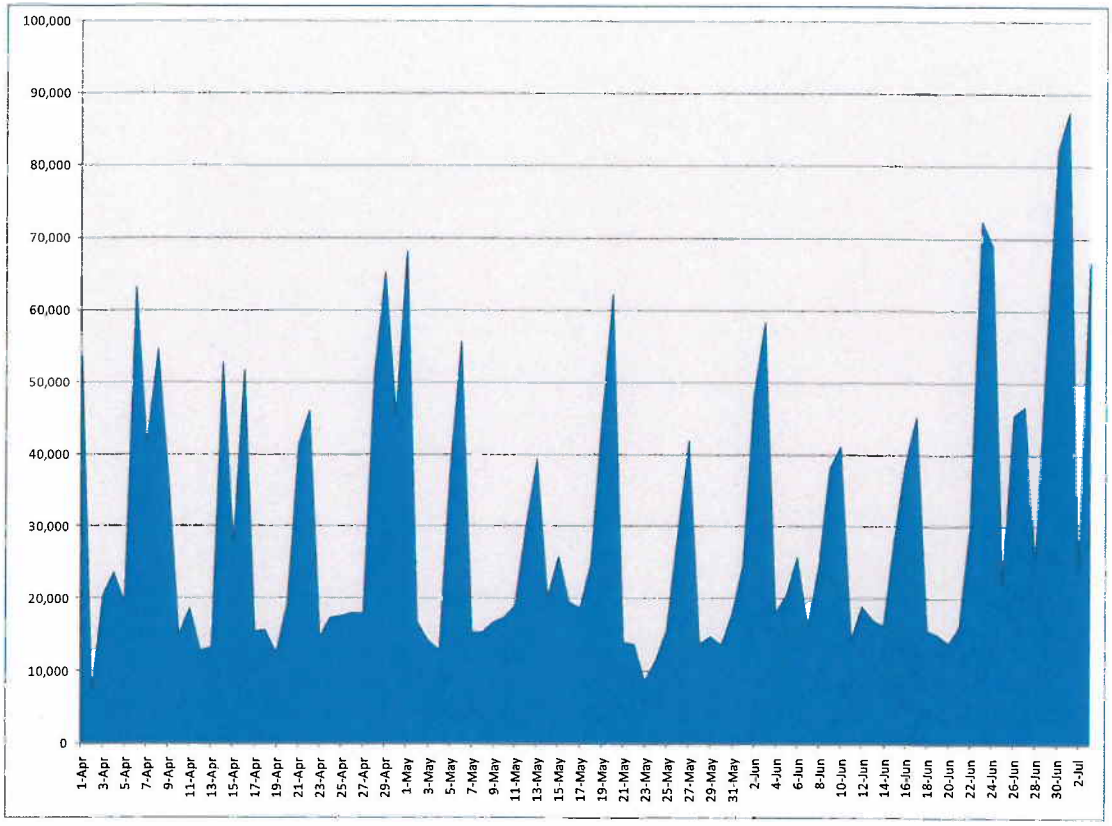
Figure 5: Comparison of Average Peak Day to Other San Francisco Events

Event Name	Attendance	# of Days	Average Attendance Per Day
SF Fleet Week[1]	1,200,000	6	n/a
SF LGBT Pride Parade & Celebration	750,000	2	375,000
Chinese New Year Parade	400,000	1	400,000
Carnaval	400,000	2	200,000
Folsom Street Fair	350,000	2	175,000
Cherry Blossom Festival & Grand Parade	200,000	4	50,000
T Mobile Bike Race	115,000	1	115,000
SF Chinatown Autumn Moon Festival	100,000	2	50,000
Asian Heritage Street Celebration	90,000	1	90,000
St. Patrick's Day Parade	85,000	1	85,000
Sunday Streets (highest visitation)	80,000	1	80,000
Castro Street Fair	62,000	1	62,000
The Dyke March	50,000	1	50,000
SF Giants Game	45,000	1	45,000
SF International Dragon Boat Festival	45,000	2	22,500
SF Juneteenth	35,500	1	35,500
Nihonmachi Street Fair	25,000	2	12,500
Vietnamese Lunar New Year Tet Fetival	25,000	1	25,000
Korean Day Festival & Parade	20,000	1	20,000
SF Aloha Festival	16,000	1	16,000
Comedy Day	6,500	1	6,500
Cinco de Mayo	6,000	1	6,000
Greek Flag Day Cultural Day Celebration & Parade	4,000	1	4,000
Russian Festival	3,000	1	3,000
Parol Lantern Festival & Parade	1,500	1	1,500
Samoan Flag Day Celebration	600	1	600

[1] Fleet Week lasts for 6 or 7 days, although the majority of attendance, assumed to be around 80%, occurs over two weekend days when the Blue Angels perform in the airshow.

Source: San Francisco Grants for the Arts and California Cultural Database Project.

Figure 6: Peaking Pattern from AC32 in Valencia



GEOGRAPHIC DISTRIBUTION OF VISITORS

The next step in AECOM's analysis was to estimate the locations from which spectators on an average peak weekend and weekday race day would likely view the race. We used the following methodology to calculate these estimates:

- We divided the estimated 334,000 spectators on an average peak weekend race day into two major categories: landside spectators and water spectators.
- The number of water spectators was developed based upon input from the race organizers related to the likely number of boats in three categories: large private yachts, commercial charters, and recreational boats (**see Figure 7**).

Figure 7: Estimated Water-based Spectators for AC34 2013

Type of Boat	# of Boats	Avg. No. of Passengers per Boat	Total No. of Passengers
Recreational	2,200	6	13,200
Commerical Charters	20	150	3,000
Large Private Yachts	60	30	1,800
Total All Boats	**2,280**	**8**	**18,000**

Source: AECOM.

- The remaining estimated land spectators were then further divided into two categories, Bay Area residents and tourists, based upon our original penetration rate analysis (assuming a similar distribution to the total attendance).
- We estimated the county of origin for the Bay Area resident spectators by first calculating the percentage of total Bay Area population represented by each county in 2013. We then adjusted this percentage higher or lower based upon several factors including proximity to San Francisco and the major viewing sites for AC34 and demographic characteristics. We applied these new percentages to the total number of estimated Bay Area spectators to develop spectators by county and cross-checked the reasonableness of these numbers by calculating the penetration rates resulting from this analysis.
- Finally, we estimated the percentage of people from each county who would likely travel to San Francisco to view the races and take part in the race festivities versus the number who would travel to locations outside of San Francisco to view the races. It should be noted that for purposes of this analysis, Treasure Island was categorized as outside San Francisco proper. This estimate was based on several factors including availability of public transportation to race viewing areas and the general appeal of viewing areas outside San Francisco available to residents in various counties. It should be noted that AECOM had detailed discussions with race organizers related to the quality of viewing areas in Marin, Treasure Island, Angel Island, and other locations.

The results of this analysis are shown in **Figure 8** on the following page.

Estimate of Visitor Distribution by Specific Viewing Location

Finally, in order to assist with planning efforts and impact studies, AECOM developed a detailed estimate of visitors by specific viewing area (see **Figure 9**). There are several important considerations associated with this projection:

- This estimate represents one hypothetical scenario of where spectators might choose to go to view AC34 races and participate in race festivities on a peak day.
- As part of the analytical process for developing these estimates, we examined the primary spectator areas with the best viewing areas, considered the known destinations such as Crissy Field and Marina Green which typically host Bay-oriented activities and other major festivals, and also evaluated a number of qualitative factors such as transit access, the race course layout, entertainment programming, and assumptions about marketing efforts to encourage visitors to go to programmed areas.
- To a certain extent, the location of spectators can be controlled through race management, marketing, and operations. For example, race organizers can create programming and marketing efforts that will encourage visitors to gravitate towards programmed areas with facilities, services, and activities. They can also limit access in specific areas or program smaller sponsor events.
- We have developed estimates over the course of a day as well as at a peak time, projected to be 80 percent of a peak day attendance. This represents an average, since different race day profiles would likely result in varying hourly peaking patterns.
- While these numbers present an estimate of where spectators might be at any given time, in reality, spectator numbers are fluid, as specatators will walk around, enter restaurants and retail shops, and go in and out of programmed areas even during peak times during a peak day, given the nature of large-scale events with multiple "attractions."

Figure 8: Estimated Visitor Origin and Location of AC34 2013 Spectators on an Average Peak Weekend Race Day

County	2013 Population	% of Bay Area Population	% of Peak Day Attendance	Avg. Peak Day Spectators	Implied Capture Rate	% watching from non SF locations	# watching from non SF locations	# watching from SF Locations
Alameda	1,554,690	21%	20%	33,900	2.2%	17%	5,800	28,100
Contra Costa	1,102,347	15%	9%	15,200	1.4%	11%	1,700	13,500
Marin	254,752	3%	8%	13,500	5.3%	30%	4,100	9,400
Napa	144,684	2%	2%	3,400	2.3%	7%	200	3,200
San Francisco	816,809	11%	25%	42,300	5.2%	5%	2,100	40,200
San Mateo	731,091	10%	12%	20,300	2.8%	4%	800	19,500
Santa Clara	1,842,527	25%	18%	30,500	1.7%	4%	1,200	29,300
Solano	438,483	6%	2%	3,400	0.8%	7%	200	3,200
Sonoma	501,775	7%	4%	6,800	1.4%	10%	700	6,100
Subtotal Resident Spectators	**7,387,158**	**100%**	**100%**	**169,300**	**2%**	**10%**	**16,800**	**152,500**
Subtotal Tourist Spectators	**n/a**	**n/a**	**n/a**	**147,100**	**n/a**	**5%**	**7,400**	**139,700**
Total Landside Spectators				**316,400**	**n/a**	**8%**	**24,200**	**292,200**
Spectators on Boats				18,000				
Total All Spectators				**334,400**				

Source: California Department of Finance, AECOM.

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- Many specific details for the event and related programming and operations could affect these numbers and are still early in the planning stage. Thus, these estimates are based upon what we know about the event as of April 2011.
- The estimates shown are expected to be in addition to whatever utilization of these areas would otherwise be taking place. The estimates indicate purposeful visitors, or visitors with the intent of watching AC34 events as at least part of their motivation for being along the Bay waterfront that day.

The distribution of visitors is roughly based on assumptions such as:

- The programmed areas will be the most appealing, as they combine prime viewing areas with entertainment, concerts, food vendors, sponsor activities, family activities, large viewing screens, portable toilets, race commentary, and other services. The programmed areas have measurable capacities, and for the most part will likely be close to capacity on peak days given these factors.
- The live sites will be designed as exciting areas with large viewing screens, food, activities, entertainment, and other features which will help draw spectators to them.
- The Embarcadero will be partially closed to allow for spectators and activities on peak days. This area also has a fairly high capacity and is close to the urban core and transit.
- Other areas were divided generally based upon viewing appeal, ease of access, and capacity.
- As stated previously, we have developed estimates for a peak day, as well as for a peak time during the day, estimated at 60 to 80 percent of daily visitation.

The resulting estimates for an average peak weekend race day in 2013 are shown in **Figure 9** on the following page. AECOM then adjusted the peak weekend race day estimates for an average peak race weekday, shown in **Figure 10**.

ESTIMATES FOR AC34 WORLD SERIES IN 2012

Finally, AECOM developed estimates for overall attendance and geographic distribution of visitors on an average peak race weekend day for the World Series in 2012. Current plans for the World Series envision two regattas, one in August and one in September. Each regatta would be between 10 and 14 days, with six race days, some other activity days (i.e. test and media days), and some rest days.

In order to estimate the percentage of overall visitors and visitors on a peak day for the World Series, we examined data from AC32 in Valencia. The year prior to the major race events (i.e. LV Cup and AC Match races), there were a series of races held, some of which were in Valencia. We examined the overall attendance (relative to number of race days) and also evaluated the peaking patterns relative to events the following year in Valencia. Our estimates for the 2012 World Series regattas held in the Bay Area were largely based upon the attendance patterns established in Valencia for events held the year leading up to the major AC32 events.

As shown in **Figures 11** and **12**, based upon input from AC34 event organizers, we segmented the event days into categories based upon likely level of spectator interest. We then estimated attendance for each of those based upon our analysis of the AC32 experience in Valencia, and then calculated total attendance.

An estimate of the geographic location of spectators on a peak race weekend day and a peak race weekday for the two regattas to be held as part of the World Series for AC34 in 2012 is shown in **Figure 13** and **Figure 14**. The major difference between 2012 and 2013 is the availability of Piers 27 and 29 for spectators in 2013.

Figure 9: Estimated Spectators Locations for AC34 2013 – Average Peak Race Day (Weekend)

Location	# of Spectators Per Day	Estimated # of Spectators: Peak Hour
SPECTATORS ON BOATS		
Recreational	13,200	8,000-10,600
Commerical Charter	3,000	1,500-2,400
Large Private Yachts	1,800	1,100-1,400
Subtotal Spectators on Boats	**18,000**	**11,000-14,400**
LANDSIDE SPECTATORS		
Outside San Francisco		
Treasure Island	12,000	7,000 to 9,600
Alcatraz Island (private)	500	300-400
Angel Island	1,000	600-800
Fort Baker / Marin Headlands / North side of GGB	3,500	2,100-2,800
Cavallo Point (private and public)	800	500-650
Sausalito	5,000	3,000-4,000
Tiburon / Belvedere	1,200	700-950
Subtotal Outside San Francisco	***24,000***	***14,000-19,000***
Programmed Areas in San Francisco		
Justin Herman Plaza (Live Site)	8,000	5,000-6,400
Union Square (Live Site)	6,000	3,600-4,800
Civic Center (Live Site)	6,000	3,600-4,800
Marina Green	55,000	33,000-44,000
Piers 27 & 29	50,000	30,000-40,000
Crissy Field (Crissy Center to Pearce / Mason)	77,000	46,000-62,000
Subtotal SF Programmed Areas	***202,000***	***121,000-162,000***
Non-Programmed Areas in San Francisco		
Presidio (incl. Crissy Picnic & west to south side of GGB	5,000	3,000-4,000
Fort Mason to Aquatic Park	7,000	4,000-5,600
Fisherman's Wharf	25,000	15,000-20,000
NE Embarcadero (Pier 42 to Fisherman's Wharf)	48,000	29,000-38,000
Other	5,000	3,000-4,000
Subtotal SF Non-Programmed Areas	***90,000***	***54,000-72,000***
Subtotal Landside Spectators	**316,000**	**189,000-253,000**
TOTAL SPECTATORS	**334,000**	**200,000-267,000**

Figure 10: Estimated Spectators Locations for AC34 2013– Average Peak Race Day (Weekday)

Location	# of Spectators Per Day	Estimated # of Spectators: Peak Hour
SPECTATORS ON BOATS		
Recreational	4,400	2,600-3,500
Commerical Charter	1,000	600-800
Large Private Yachts	900	500-700
Subtotal Spectators on Boats	**6,300**	**3,700-5,000**
LANDSIDE SPECTATORS		
Outside San Francisco		
Treasure Island	1,500	900-1,200
Alcatraz Island (private)	0	0
Angel Island	50	30-40
Fort Baker / Marin Headlands/ North side of GGB	300	180-240
Cavallo Point (private and public)	150	90-120
Sausalito	225	135-180
Tiburon / Belvedere	25	15-20
Subtotal Outside San Francisco	***2,250***	***1,300-1,800***
Programmed Areas in San Francisco		
Justin Herman Plaza (Live Site)	0	0
Union Square (Live Site)	0	0
Civic Center (Live Site)	0	0
Marina Green	8,200	5,000-6,600
Piers 27 & 29	10,350	6,000-8,300
Crissy Field (Crissy Center to Pearce / Mason)	12,300	7,400-9,800
Subtotal SF Programmed Areas	***30,850***	***18,000-25,000***
Non-Programmed Areas in San Francisco		
Presidio (incl. Crissy Picnic & west to south side of G	500	300-400
Fort Mason to Aquatic Park	1,000	600-800
Fisherman's Wharf	3,900	2,300-3,100
NE Embarcadero (Pier 42 to Fisherman's Wharf)	5,200	3,100-4,200
Other	0	9
Subtotal SF Non-Programmed Areas	***10,600***	***6,300-8,500***
Subtotal Landside Spectators	**43,700**	**26,00-35,000**
TOTAL SPECTATORS	**50,000**	**30,000-40,000**

Figure 11: 2012 World Series Regatta Days by Level of Spectators Interest (per Regatta)

Day	Activity	Interest Level			
		Very High	High	Medium	Low
Friday	Test Day			1	
Saturday	PR Day				1
Sunday	Fleet Race	1			
Monday	Rest				1
Tuesday	Rest				1
Wednesday	Match			1	
Thursday	Match			1	
Friday	Match		1		
Saturday	Match		1		
Sunday	Fleet Race	1			
Total		**2**	**2**	**3**	**3**

Figure 12: Estimated Attendance by Category for AC34 World Series in 2012 (includes two regattas)

Category	# of Days per Regatta	Total Days in 2012	Avg. People Per Day	Total # of People
Very High Interest Days (Peak)	2	4	197,000	788,000
High Interest - Weekend	1	2	120,000	240,000
High Interest - Weekday	1	2	45,000	90,000
Medium Interest Days	3	6	35,000	210,000
Low Interest Days	3	6	21,000	126,000
Total	**10**	**20**	**n/a**	**1,454,000**

Figure 13: Estimated Geographic Distribution of AC34 World Series Spectators on a Peak Race Day, 2012

Location	# of Spectators Per Day	Estimated # of Spectators. Peak Hour
SPECTATORS ON BOATS		
Recreational	11,000	6,500-8,800
Commerical Charter	2,000	1,200-1,600
Large Private Yachts	0	0
Subtotal Spectators on Boats	**13,000**	**7,500-10,400**
LANDSIDE SPECTATORS		
Outside San Francisco		
Treasure Island	5,500	3,300-4,400
Alcatraz Island (private)	500	300-400
Angel Island	1,000	600-800
Fort Baker / Marin Headlands/ North side of GGB	2,000	1,200-1,600
Cavallo Point (private and public)	800	450-650
Sausalito	3,500	2,100-2,800
Tiburon / Belvedere	1,000	600-800
Subtotal Outside San Francisco	***14,300***	***8,500-11,400***
Programmed Areas in San Francisco		
Justin Herman Plaza (Live Site)	5,000	3,000-4,000
Union Square (Live Site)	0	0
Civic Center (Live Site)	0	0
Marina Green	57,000	34,000-45,000
Piers 27 & 29	0	0
Crissy Field (Crissy Center to Pearce / Mason)	75,000	45,000-60,000
Subtotal SF Programmed Areas	***137,000***	***82,000-109,000***
Non-Programmed Areas in San Francisco		
Presidio (incl. Crissy Picnic & west to south side of G	2,000	1,200-1,600
Fort Mason to Aquatic Park	3,000	1,800-2,400
Fisherman's Wharf	15,000	9,000-12,000
NE Embarcadero (Pier 42 to Fisherman's Wharf)	10,000	6,000-8,000
Other	3,000	1,800-2,400
Subtotal SF Non-Programmed Areas	***33,000***	***20,000-26,000***
Subtotal Landside Spectators	**184,300**	**100,000-147,000**
TOTAL SPECTATORS	**197,300**	**118,000-158,000**

Figure 14: Estimated Geographic Distribution of AC34 2012 World Series Spectators on a Peak Race Weekday

Location	# of Spectators Per Day	Estimated # of Spectators: Peak Hour
SPECTATORS ON BOATS		
Recreational	3,800	2,200-3,000
Commerical Charter	800	450-650
Large Private Yachts	0	0
Subtotal Spectators on Boats	**4,600**	**2,700-3,700**
LANDSIDE SPECTATORS		
Outside San Francisco		
Treasure Island	1,300	750-1,000
Alcatraz Island (private)	0	0
Angel Island	50	30-40
Fort Baker / Marin Headlands/ North side of GGB	250	150-200
Cavallo Point (private and public)	100	60-80
Sausalito	200	120-160
Tiburon / Belvedere	50	30-40
Subtotal Outside San Francisco	***1,950***	***1,100-1,600***
Programmed Areas in San Francisco		
Justin Herman Plaza (Live Site)	0	0
Union Square (Live Site)	0	0
Civic Center (Live Site)	0	0
Marina Green	18,000	10,000-14,000
Piers 27 & 29	0	0
Crissy Field (Crissy Center to Pearce / Mason)	11,000	6,500-8,500
Subtotal SF Programmed Areas	***29,000***	***17,000-23,000***
Non-Programmed Areas in San Francisco		
Presidio (incl. Crissy Picnic & west to south side of G	450	250-350
Fort Mason to Aquatic Park	900	550-700
Fisherman's Wharf	3,500	2,100-2,800
NE Embarcadero (Pier 42 to Fisherman's Wharf)	4,600	2,700-3,700
Other	0	0
Subtotal SF Non-Programmed Areas	***9,450***	***5,600-7,500***
Subtotal Landside Spectators	**40,400**	**24,000-32,000**
TOTAL SPECTATORS	**45,000**	**27,000-36,000**